

Module 1

Chapter 5

Updating and Viewing the Employee Record

Chapter Overview

Introduction This chapter explains the use of the People window (Record) for updating and viewing employee records in such areas as education, licenses, emergency contacts, etc. It is also used in the procedure, **Building an Applicant**, when a recruitment tool such as Resumix is not used.

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Chapter Overview, Continued

Before You Begin

The **People** window is used to enter and update employee information when an RPA/NPA is not required. It is also used for retrieving or viewing current information on an employee. Oracle HR contains both a **People** Record and a **Position** Record. The two records are linked together through assignment.

The People Window

The People window has four Regions and six Taskflow buttons:

Note: Grayed out fields cannot be updated.

Data Fields/Buttons	Description
Last	Last name plus suffix (Jr., III, etc.)
First	First name
Title	Not used by DoD (Mr., Mrs., etc.)
Prefix	Not used by DoD (grayed out)
Suffix	Not used by DoD (grayed out)
Middle	Middle name or initial
Female	Female/Male/Unknown Gender
Social Security	Automatically populates
Employee	System-generated number- not used by DoD
Applicant	System-generated number
Personal Information Region:	Birth Date automatically populates Work Telephone and Email can be added at a later time.

Chapter Overview, Continued

The People Window (continued)

Data Fields/Buttons	Description
From/To	Self-explanatory
Blank DFF	Grayed out
Taskflow Buttons:	
Address	Payroll updates and feeds back to Oracle HR. There are six types: Forwarding, Overseas, Residence 1, Residence 2, etc.
Assignment	Assignment information for tracking purposes. <i>Supervisor</i> data field not used by DoD. Position hierarchy is used to maintain supervisory information (see Module 2). The Assignment Taskflow Button links the People Records with the Position Records and is used for viewing only.
Extra Information (single occurring item)	Maintains additional employee information such as acquisition, kinds of employees (local nationals, NAF, NG, etc.), security, etc.
Special Information (multiple occurring items)	Maintains special information such as demo projects, education, acquisition waivers, details, NAF, completed and required training, and Career Management Programs.
Others (view only)	Finance Information is updated from the bi-weekly Personnel Pay Application Data (PAD) interface file. Person Summary is a snapshot of person and position information.

Updating the Employee Record (Using Assignment)

Purpose

This section uses, as an example, the Assignment process for updating Government Awards in the employee record. Complete instructions can be found in Module 5, Workforce Relations Using the DCPDS, Chapter 3, Awards, Section, Entering a Non-Monetary Award.

Using Assignment to Update Government Awards

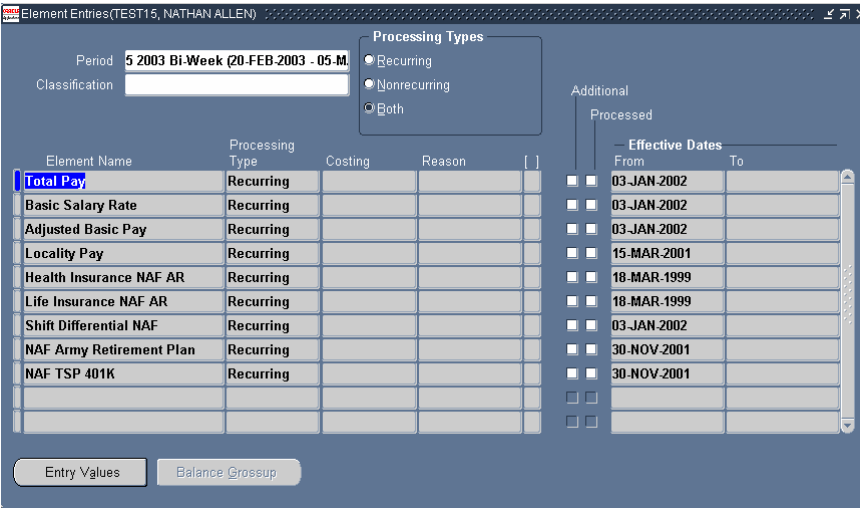
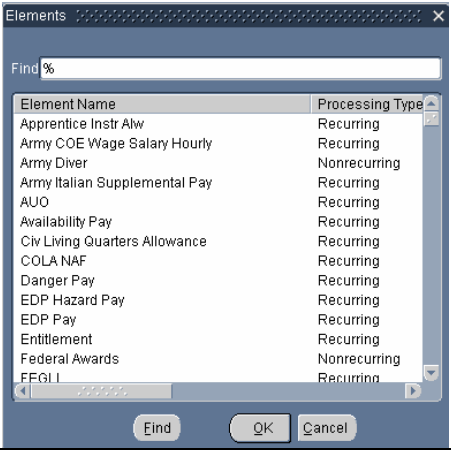
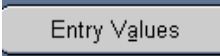
NOTE: Remember to **Date Track** as appropriate. Refer to Mod 1, Chapter 4 for specifics.

Step	Action
1	Navigation Path People Enter and Maintain <Open> .
2	The Find Person window opens. Query the employee by typing in the last name and clicking the <Find> button.
3	The People window opens with the employee data populated.
4	Click the <Assignment> button. The Assignment window displays many of the data fields populated and/or grayed out and three Taskflow Buttons. <Tax Information> , <Entries> and <Others> .

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Updating the Employee Record (Using Assignment), Continued

Using Assignment to Update Government Awards (continued)


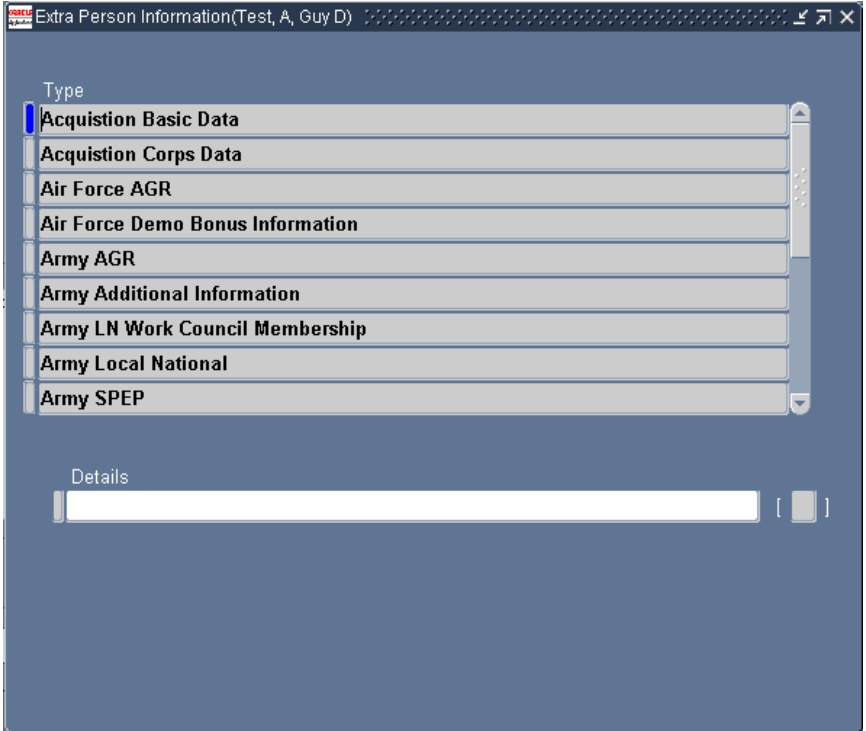
Step	Action
5	<p>After invoking the Element Entries window. The cursor will be in the first data field in the <i>Element Name</i> column. Move the cursor to the first blank data field.</p> <p>Click the LOV icon select <i>Government Awards</i> then click <OK>.</p>  
6	<p>Click <Entry Values> button  to open the Values window. You can type the appropriate award data in the white data fields or click the LOV to make selections. Click the <OK> button.</p>
7	Click Save and exit the windows.

Updating the Employee Record (Using Extra Information)

Purpose

This section uses the process for Updating US Government Separation and Retirement data in the employee record, as an example.

Using the Extra Information to Update

Step	Action
1	Navigation Path \square <i>People</i> \square <i>Enter and Maintain</i> \square <Open> .
2	The Find Person window opens. Query the employee by typing in the last name and clicking the <Find> button.
3	The People window automatically populates with employee data.
4	Click the <Extra Information> .  button to open the window 

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Updating the Employee Record (Using Extra Information),

Continued

Flexfields

The following is a listing of flexfields in the **Extra Person Information** window. There are data fields within each flexfield. Enter information as required.

Flexfields
Acquisition Basic Data
Acquisition Corps Data
Air Force AGR
Army AGR
Army Additional Information
Army LN Work Council Membership
Army Local National
Army SPEG
Birth Information
CIPMS
DIS Security
FELGI Open Season
Handicapped Additional Information
Local National Conduct/Performance
Local Nationals
Military Affiliation
NAF Additional Person Information
NAF Army-Pay
NAF Army – Payroll Information
NAF Army Allow and Earnings
NAF Army Retirement TSP and 401K
National Guard AUR (AGR)
Navy NRL Demo Main Pay Info

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Updating the Employee Record (Using Extra Information), Continued

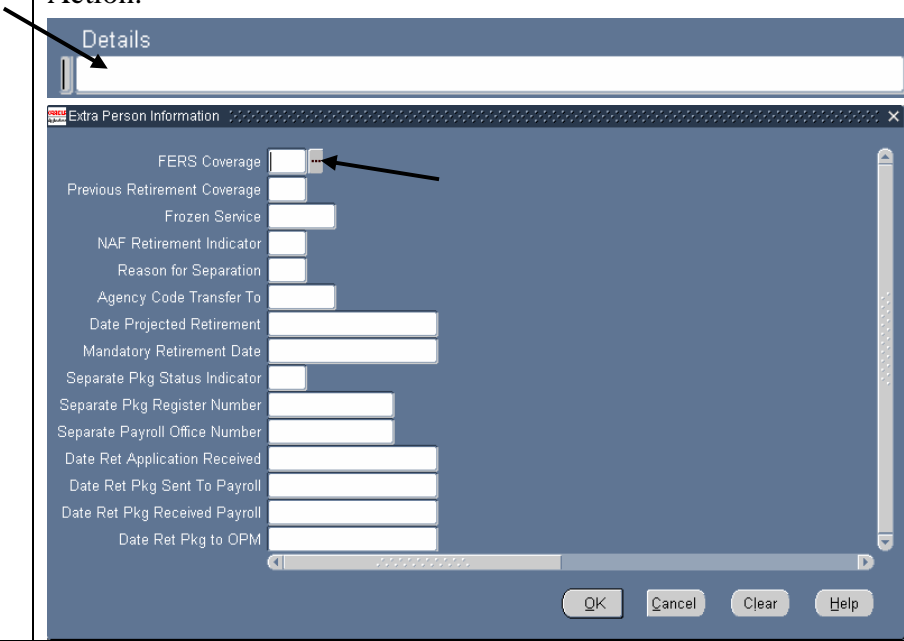
Flexfields (continued)

Flexfields
Navy Security Information
NAVY NRL Demo Maint Pay Info
OSDMIL
Other Person Information
Overseas Tour Person Information
Panama
Personal Contingency Area
Salary Award
Training Program Requirements
US Government Complaint Tracking
US Government Conversions
US Government Mass Actions
US Government Person Group 1
US Government Person Group 2
US Government Person SF52
US Government Probations
US Government Retained Grade
US Government SCD Information
US Government Security
US Government Separation and Retirement
US Government Uniformed Services
US Government User Information
US Government Workflow Routing Groups
USUHS Info
Welfare to Work

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Updating the Employee Record (Using Extra Information), Continued

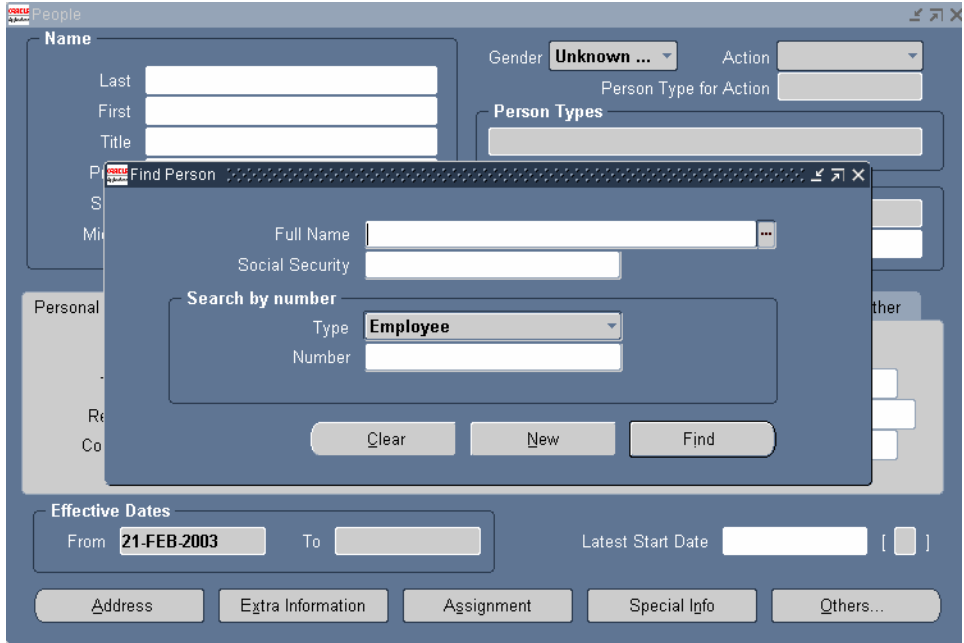
Using the Extra Information (continued)

Step	Action
5	Use the scroll bar to the right to select US Government Separation and Retirement
6	<p>Double click in the Details field. To display the Information window. Click the LOV icon for each appropriate data field, as some fields should only be updated via a Request for Personnel Action.</p> 
7	Click the <OK> button to close window.
8	Click the Save icon and exit the windows.

Updating the Employee Record (Using Special Information)

Purpose This section uses the process for updating education in the employee record, as an example.

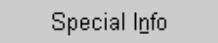
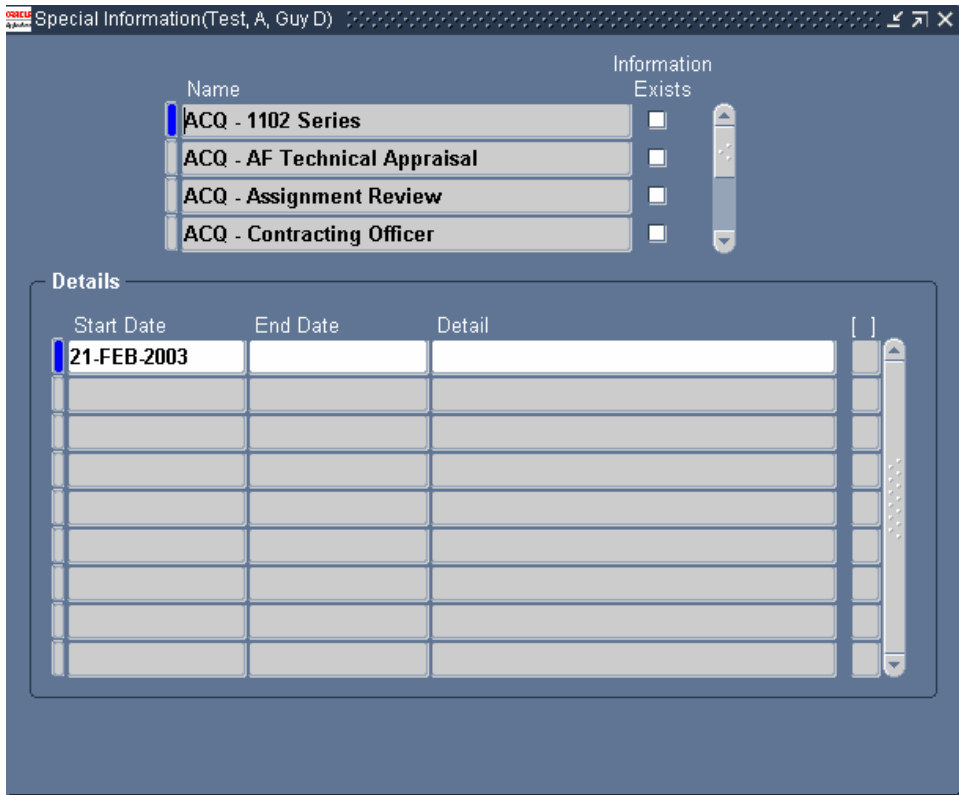
Using Special Information (SIT) to Update Education

Step	Action
1	Navigation Path People Enter and Maintain <Open> .
2	<p>The People window opens with the Find Person window displayed. Query for the employee by typing in the last name and clicking the <Find> button.</p> 

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Updating the Employee Record (Using Special Information), Continued

Using Special Information (SIT) to Update Education (continued)

Step	Action
3	The People window is populated with the employee's data.
4	<p>Click the <Special Info>.  button to invoke the Special Information window.</p> 

Flexfields

The following is a listing of flexfields in the **Special Information** window. There are data fields within each flexfield. Enter information as required.

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Updating the Employee Record (Using Special Information), Continued

Flexfields (continued)

Flexfields
ACQ - 1102 Series
ACQ - AF Technical Appraisal
ACQ - Assignment Review
ACQ - Contracting Officer
ACQ - Crit Acq Posn Waivers
ACQ - Other CAP Waivers
ACQ - PEO Waivers
ACQ - PM and DPM Waivers
ACQ - SCO Waivers
ACQ - SES Waivers
ACQ - Warrant Data
AF Career Management Program
AGR Prof Dev Program Data
AGR Reassignment Data
Air Force Demo Bonus Info
Appr – Air Force Lab Demo
Appr – Army Lab Demo
Appr – China Lake Demo
Appr – DOD Acquisition Demo
Appr – Naval Research Lab Demo
Appr – Space Nav Warfare Demo
Appr – Warfare Center Demo
Appraisal - Non-Appr Fund
Army Career Program
Certifications
Completed Training

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Updating the Employee Record (Using Special Information), Continued

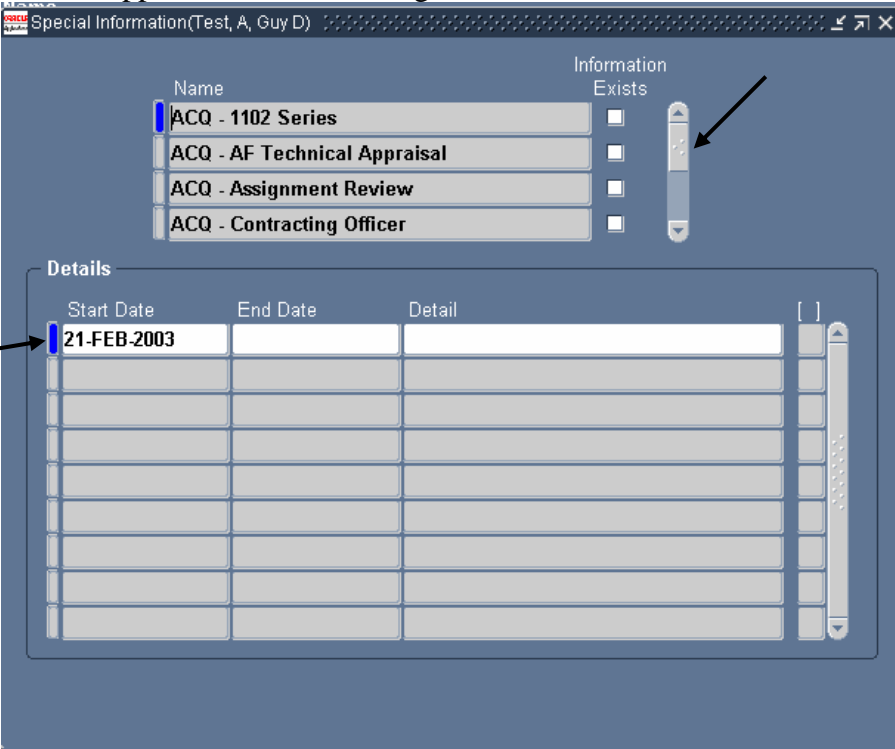
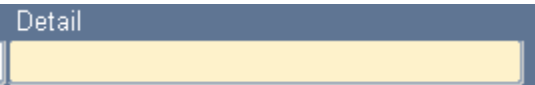
Flexfields (continued)

Flexfields
Demo Project – CCAS
Demo Project – NV Warfare Labs
Demo Project – Performance Pay
Detail Information
Education
NAF (401)K Changes
NAF Army Payroll - Bonds
NAF Career Program
NAF Life Insurance Changes
NAF Medical Insurance Changes
NAF Prev Retmnt Enrollments
NAF Retirement Changes
NAF Rev Pay Deductions
NAF Rev Pay Leave Time 1
NAF Rev Pay Leave Time 2
NAF Rev Pay Salary
NAF Rev Pay Taxes
NAF Unclaimed Compensation
NRL Demo Project – Navy
NRL Demo Project – Navy CCS
Required Training
US Gov Cndtn of Emplmt
US Gov Conduct Perf
US Gov Language
US Gov Performance Appraisal
US Gov Spcl Consdrtn

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Updating the Employee Record (Using Special Information), Continued

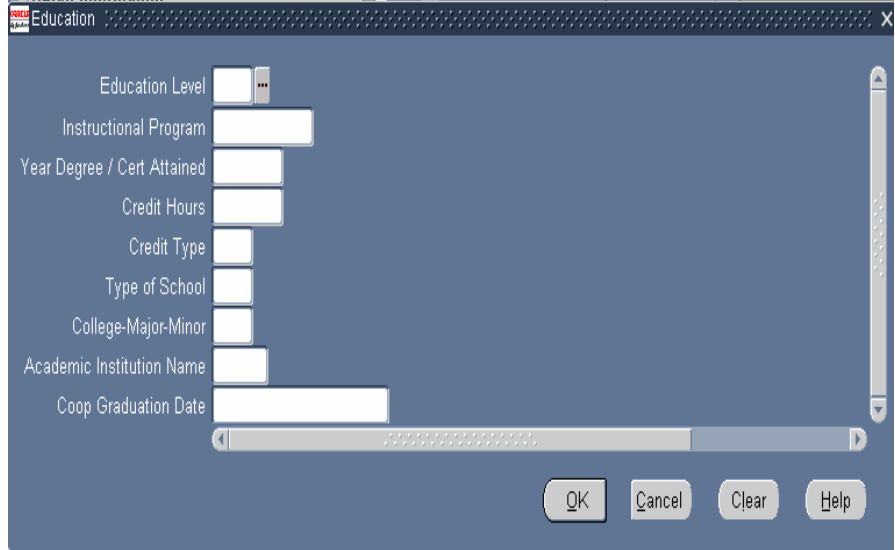
Using Special Information (SIT) to Update Education (continued)

Step	Action
5	<p>Use the upper scroll bar to the right to select Education.</p>  <p>The current date populates in the Start Date data field in the Details Region, but you can override it by Date Tracking to the appropriate start date. The End Date data field displays a date for actions that have specific end dates, such as performance appraisals, completed training, reprimands, etc.</p>
6	<p>Double click in the Detail data field to invoke form.</p> 

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Updating the Employee Record (Using Special Information), Continued

Updating the Employee Record (Using the Special Information Type) (continued)

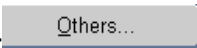
Step	Action
7	<p>The Education window opens. Click the elipsis at the end of the line to enter the information in the data fields as required by the business rules:</p>  <p>The screenshot shows a window titled 'Education' with a list of fields on the left and a large text area on the right. The fields are: Education Level (with an elipsis button), Instructional Program, Year Degree / Cert Attained, Credit Hours, Credit Type, Type of School, College-Major-Minor, Academic Institution Name, and Coop Graduation Date. At the bottom right are buttons for OK, Cancel, Clear, and Help.</p>
8	Click the <OK> button.
9	Click the Save icon and exit the windows.

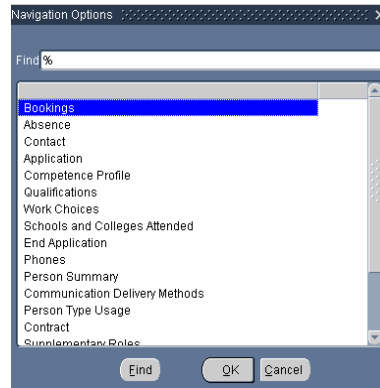
Updating the Employee Record (Using Others)

Purpose

This section guides you through the procedure for updating emergency contacts (spouses, children, etc.) and their addresses.

Using Others to Update Emergency Contacts

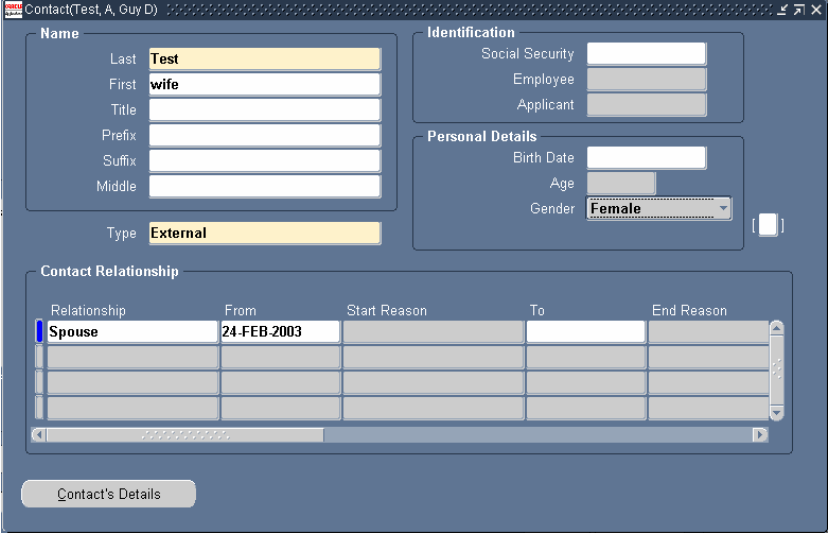
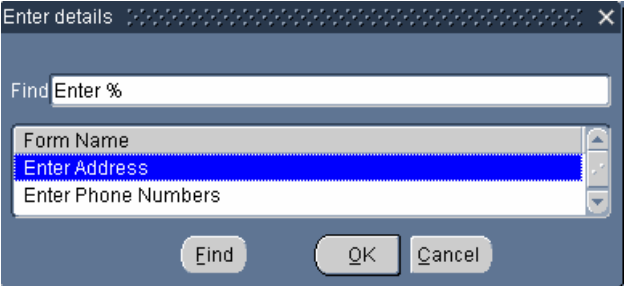
Step	Action
1	Navigation Path People Enter and Maintain <Open> . The Find Person window opens. Query the employee by typing in the last name and clicking the <Find> button.
2	The People window automatically populates with employee data.
3	Click the <Others>  button. To open the Navigation Options window
4	Select Contact . Click the <OK> button to open window



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Updating the Employee Record (Using Others), Continued

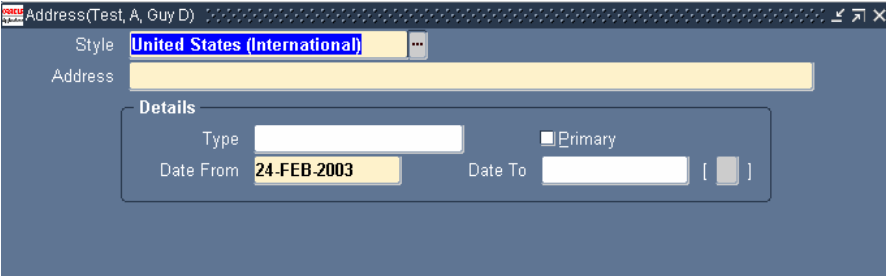
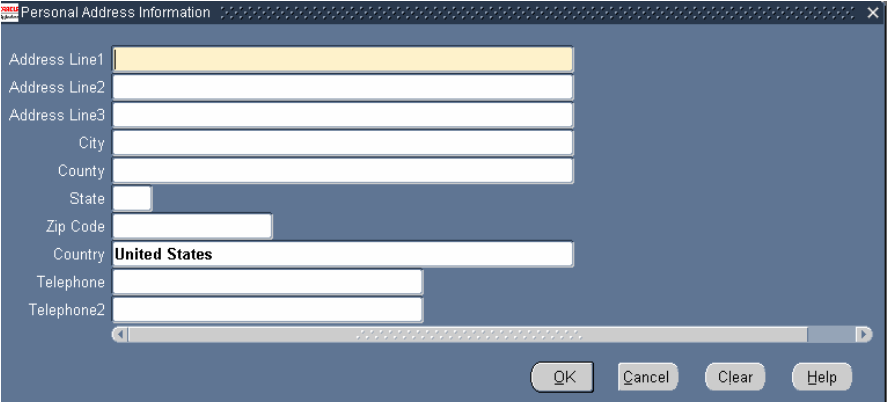
Using Others to Update Emergency Contacts (continued)

Step	Action
5	<p>Type in the contact's name in the Name Region. The Type data field populates with "External". Place the cursor in the Relationship Region and select the type of contact.</p>  <p>Click the <Contact's Details> button, select Enter Address from the details window and click the <OK> button.</p> 

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Updating the Employee Record (Using Others), Continued


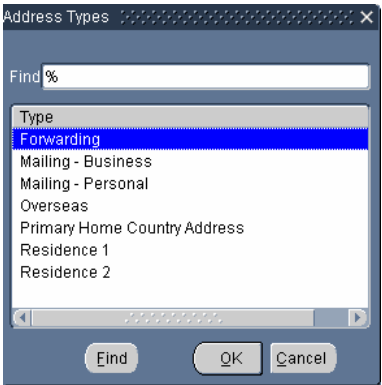

Using Others to Update Emergency Contacts (continued)

Step	Action
6	<p>The address window displays the <i>Country</i> data field populated with “United States.”</p>  <p>The screenshot shows a window titled 'Address(Test, A, Guy D)'. It has a 'Style' dropdown set to 'United States (International)'. Below it is an 'Address' text field. A 'Details' section contains a 'Type' dropdown, a 'Date From' field with '24-FEB-2003', a 'Date To' field, and a 'Primary' checkbox.</p>
7	<p>Click in the Address field to open the window. Type in the Address Line1. Enter the City, State, Zip Code, and County. Telephone number is optional. Click the <OK> button.</p>  <p>The screenshot shows a window titled 'Personal Address Information'. It contains several text input fields: 'Address Line1', 'Address Line2', 'Address Line3', 'City', 'County', 'State', 'Zip Code', 'Country' (populated with 'United States'), 'Telephone', and 'Telephone2'. At the bottom are buttons for 'OK', 'Cancel', 'Clear', and 'Help'.</p>

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Updating the Employee Record (Using Others), Continued

Using Others to Update Emergency Contacts (continued)

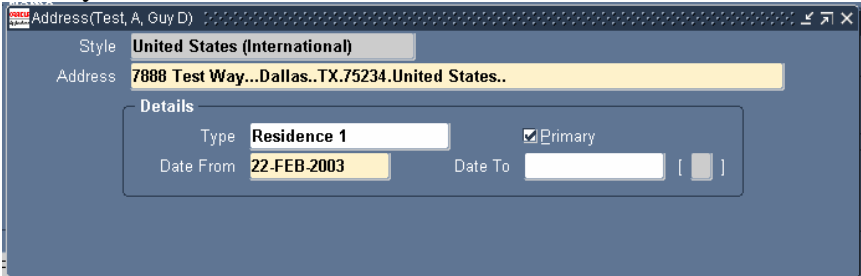
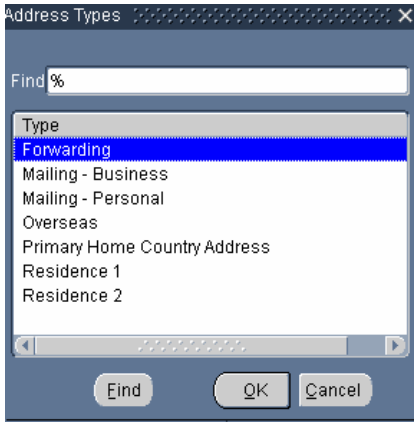
Step	Action	
8	From the main Address window click in the Type data field then click  the ellipsis to select address type.	
9	Select the type of address, and then click the <OK> button. 	
10	Click the Save icon. And close the form to return to the People window.	
	If you ...	Then ...
	Want to create additional contacts	Exit the window back to the Contact window. Click New Record on the Toolbar and complete the steps described above.
	Do not want to create additional contacts	Exit.
	Note: If you create more than one contact, the contact designated as “Primary” will be the first window displayed when you check the data again. Use the Up and Down arrow keys to view the data.	

Viewing the Employee Address

Purpose

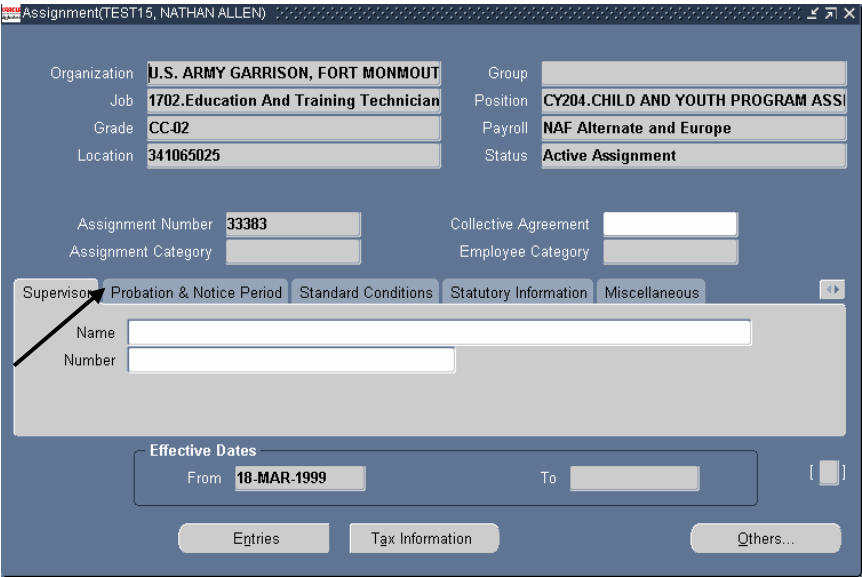
This section explains the steps to view the Employee Record using different Taskflow Buttons to access information.

Viewing Address Information

Step	Action
1	Follow steps 1-3 as described in “Updating the Employee Record” to open the People window.
2	<p>Click the <Address> button. The window will display the employee’s address, if any, and is stored in the Residence 1 in the Type datafield. An address file is received from DFAS every two weeks and will update the employee’s record if there are any changes. If you make entries to this area, it will be overwritten by DFAS each pay period if it is different from what DFAS has on their system.</p>  <p>The screenshot shows a window titled 'Address(Test, A, Guy D)'. It has a 'Style' dropdown set to 'United States (International)' and an 'Address' field containing '7888 Test Way...Dallas..TX.75234.United States..'. Below this is a 'Details' section with a 'Type' dropdown set to 'Residence 1', a checked 'Primary' checkbox, a 'Date From' field set to '22-FEB-2003', and an empty 'Date To' field with a calendar icon.</p>
3	<p>Click in the Type data field and insert a % in the Find field to select another Address Type. Note: Data can be stored in these areas but for information only and is not retrievable.</p>  <p>The screenshot shows a window titled 'Address Types'. It has a 'Find' field containing a '%' character. Below it is a list box with the following items: 'Forwarding', 'Mailing - Business', 'Mailing - Personal', 'Overseas', 'Primary Home Country Address', 'Residence 1', and 'Residence 2'. The 'Forwarding' item is selected. At the bottom are 'Find', 'OK', and 'Cancel' buttons.</p> <p>Click the <OK> button to select the data. Exit the window.</p>

Viewing the Employee Assignment

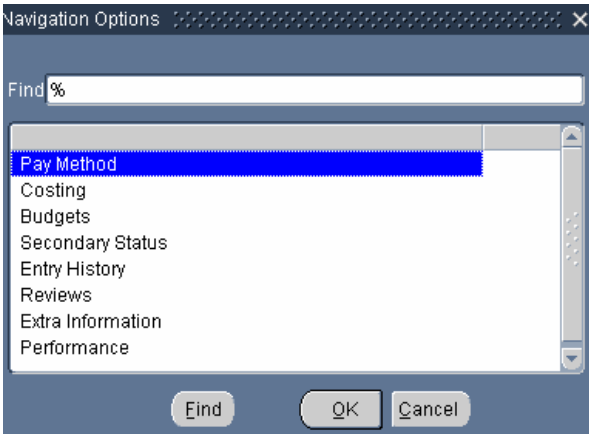
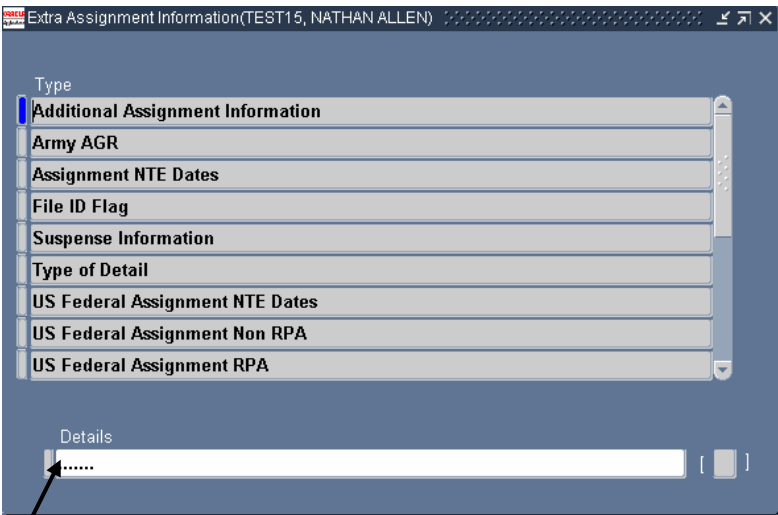
Viewing Assignment Information

Step	Action
1	Follow steps 1-3 as described in “Updating the Employee Record” to open the People window.
2	<p>Click the <Assignment> button to open the Assignment window. The top region displays the <i>Organization, Job, Grade, Location, Position, Payroll</i>, and <i>Status</i> data fields, as well as the <i>Effective Dates</i>.</p> 
3	DoD does not use the alternate region tabs such as the Supervisor field nor the < Tax Information > Taskflow button. However, the < Others > and < Entries > Taskflow buttons are used. < Entries > is also discussed in Module 6, Pay, Benefits, and Entitlements.

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Viewing the Employee Assignment, Continued

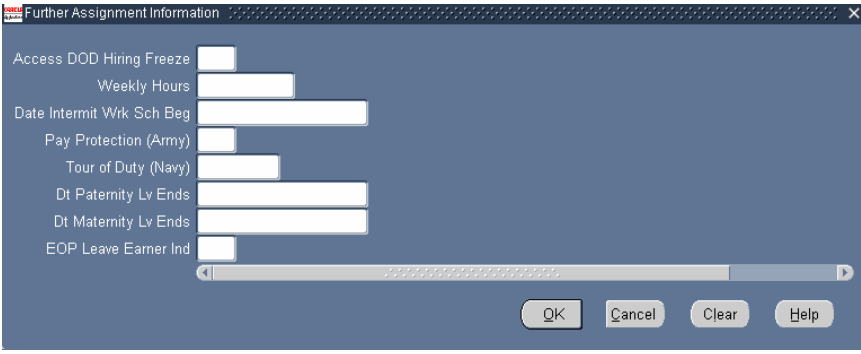
Viewing Assignment Information (continued)

Step	Action
4	<p>Click the <Others> button to invoke the Navigation Options window. Select an Option, such as <i>Extra Information</i> then click the <OK> button.</p> 
5	<p>The Extra Information window will open. This provides additional assignment and pay information for both Appropriated and Non-Appropriated Fund employees such as NTE dates, type of detail, and pay rate determinant (US Government Assignment SF52).</p> 
6	<p>Select an <i>Information Type</i>, then Double click in the Details field to open window.</p>

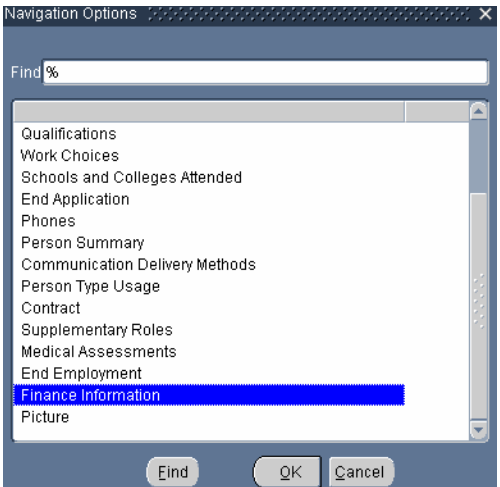
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Viewing the Employee Assignment, Continued

Viewing Assignment Information (continued)


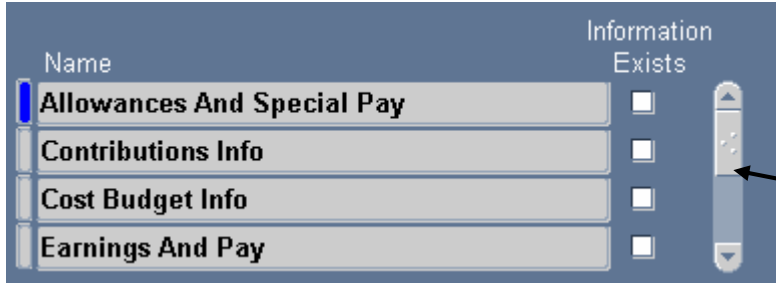
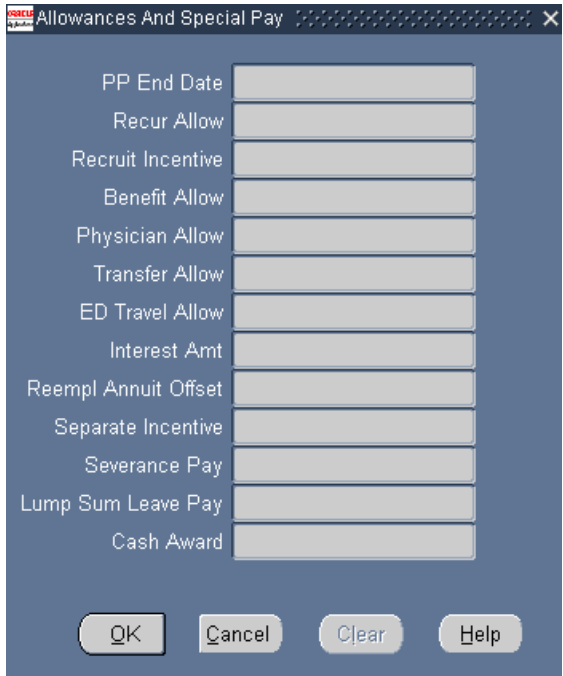
Step	Action
7	<p>Click the elipsis to select the appropriate information for each field according to the DoD business rules. Then click the <OK> button.</p>  <p>Repeat the process for each Option selected, When complete close windows and Save work.</p>

Viewing Others Information

Step	Action
1	Follow the previous steps as described in “Using the Extra Information” procedure to open the People window.
2	<p>Click the <Others> button to open the Navigation Options window. Select Finance Information and click <OK>.</p> 

Viewing the Employee Record, Continued

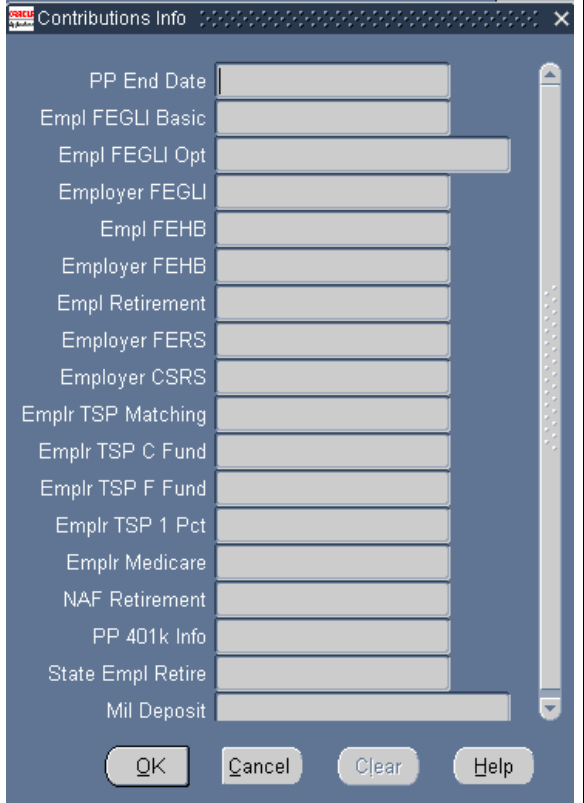
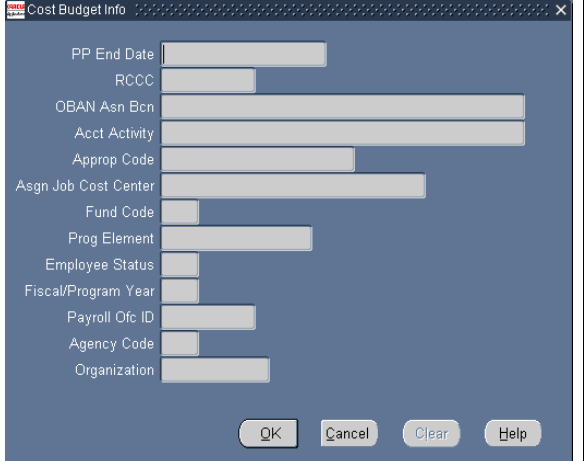
Viewing Others Information (continued)

Step	Action
3 	<p>The Finance Special Information window displays six choices in the <i>Name</i> data field. Use the scroll to right to move up or down to make your selection.</p> <p>Caution: This is view only data – do not modify.</p> 
Select	To View
Allowances and Special Pay	

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Viewing the Employee Record, Continued

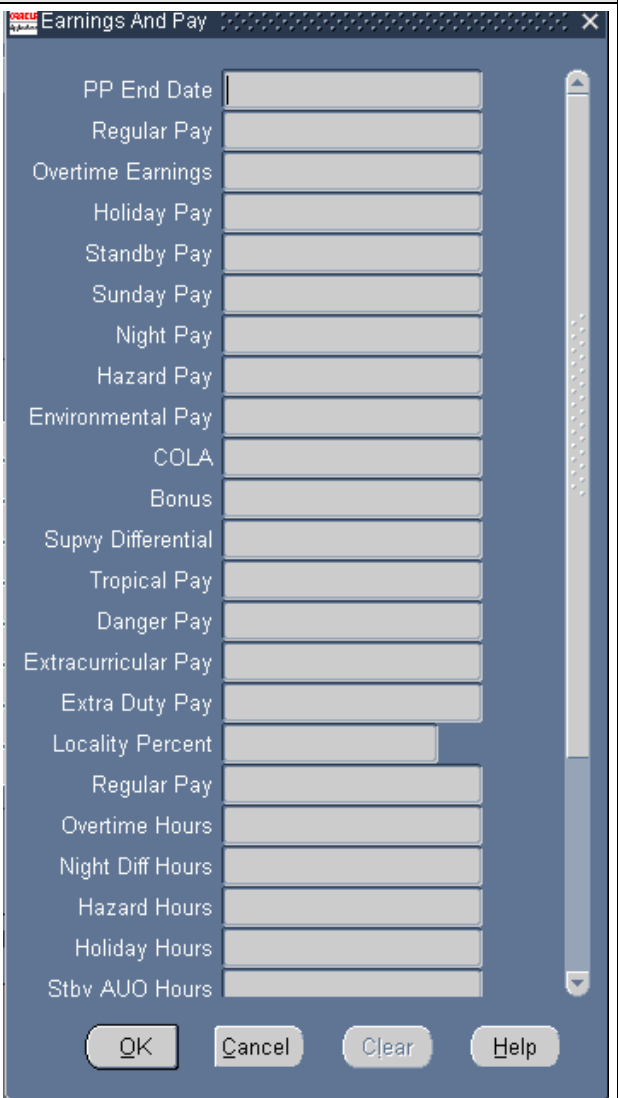
Viewing Others Information (continued)

Select	To View
Contributions Info	 <p>The 'Contributions Info' window displays a list of contribution types with checkboxes for selection. The list includes:</p> <ul style="list-style-type: none"> PP End Date Empl FEGLI Basic Empl FEGLI Opt Employer FEGLI Empl FEHB Employer FEHB Empl Retirement Employer FERS Employer CSRS Emplr TSP Matching Emplr TSP C Fund Emplr TSP F Fund Emplr TSP 1 Pct Emplr Medicare NAF Retirement PP 401k Info State Empl Retire Mil Deposit <p>Buttons at the bottom: OK, Cancel, Clear, Help.</p>
Cost Budget Info	 <p>The 'Cost Budget Info' window displays a list of cost budget fields with checkboxes for selection. The list includes:</p> <ul style="list-style-type: none"> PP End Date RCCC OBAN Asn Bcn Acct Activity Approp Code Asgn Job Cost Center Fund Code Prog Element Employee Status Fiscal/Program Year Payroll Ofc ID Agency Code Organization <p>Buttons at the bottom: OK, Cancel, Clear, Help.</p>

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Viewing the Employee Record, Continued

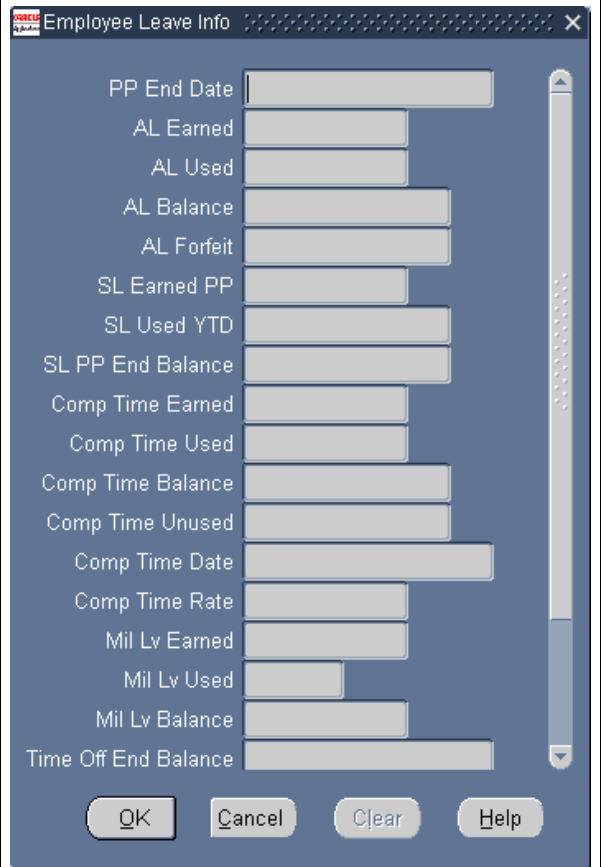
Viewing Others Information (continued)

Select	To View
Earnings and Pay	 <p>The screenshot shows a window titled "Earnings And Pay" with a list of items to view. The items are: PP End Date, Regular Pay, Overtime Earnings, Holiday Pay, Standby Pay, Sunday Pay, Night Pay, Hazard Pay, Environmental Pay, COLA, Bonus, Supvy Differential, Tropical Pay, Danger Pay, Extracurricular Pay, Extra Duty Pay, Locality Percent, Regular Pay, Overtime Hours, Night Diff Hours, Hazard Hours, Holiday Hours, and Stbv AUO Hours. The "Locality Percent" item is currently selected. At the bottom of the window are buttons for OK, Cancel, Clear, and Help.</p>

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Viewing the Employee Record, Continued

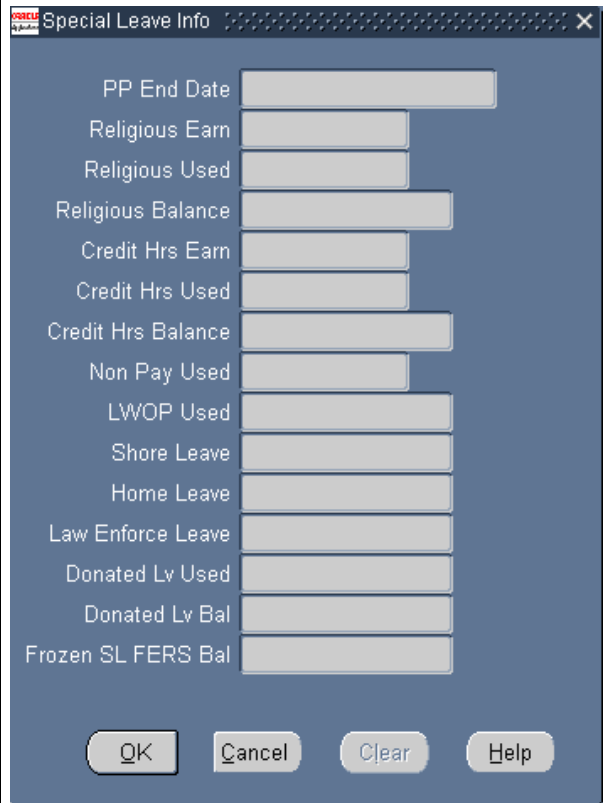
Viewing Others Information (continued)

Select	To View
Employee Leave Info	 <p>The screenshot shows a window titled "Employee Leave Info" with a list of items and their corresponding bars:</p> <ul style="list-style-type: none"> PP End Date AL Earned AL Used AL Balance AL Forfeit SL Earned PP SL Used YTD SL PP End Balance Comp Time Earned Comp Time Used Comp Time Balance Comp Time Unused Comp Time Date Comp Time Rate Mil Lv Earned Mil Lv Used Mil Lv Balance Time Off End Balance <p>At the bottom of the window are buttons: OK, Cancel, Clear, and Help.</p>

Continued on next page

Viewing the Employee Record, Continued

Viewing Others Information (continued)

Select	To View
Special Leave Info	 <p>The screenshot shows a window titled 'Special Leave Info' with a list of leave categories and their corresponding values. The categories are: PP End Date, Religious Earn, Religious Used, Religious Balance, Credit Hrs Earn, Credit Hrs Used, Credit Hrs Balance, Non Pay Used, LWOP Used, Shore Leave, Home Leave, Law Enforce Leave, Donated Lv Used, Donated Lv Bal, and Frozen SL FERS Bal. Each category has a text input field next to it. At the bottom of the window are four buttons: OK, Cancel, Clear, and Help.</p>
Step	Action
1	Follow the previous steps as described in “Using the Extra Information” procedure to open the People window.
2	Click the <Others> button to open the Navigation Options window. Select Person Summary and click <OK> .
3	Additional screens are available that contain all of a persons record. These screens include Person Information , Military/Educ , Assignment , Position , Pay , Performance , Awards and Notification of Personnel Actions . A whole record in one location can make processing additional actions much easier.

Retrieving Records

Introduction

There are a number of different ways to retrieve and view data in the DCPDS. The search capabilities allow you to quickly and easily:

- Display a specific record or group of records you need to work with.
- Look up information online, for example, to respond to an inquiry.
- Find and enter values into specific data fields.

You can search for information without having to use a complex query language. You can search by a single letter, word, group of characters, or just about anything else. And, you can find out how much information is available that matches your criteria before running the search to save computer time and your time if the search would yield too big a response (this feature is available only when using *Query-by-Example*).

Term

Query – *Query* is used interchangeably with *search* to describe the retrieval of records or data.

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